



The Forest & Climate Leaders' Partnership



# GUIDE TO MANAGING

FORESTCLIMATELEADERS.ORG WEBSITE

July 2024

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# INTRODUCTION

## Welcome to forestclimateleaders.org website management guide

Congratulations on your new forestclimateleaders.org website! This guide is designed to help you understand how to manage and update your website effectively. Whether you're adding new content, customizing the design, or ensuring everything runs smoothly, this guide will provide you with the necessary steps and tips to navigate the forestclimateleaders.org website with ease.

## Purpose of the Guide

The purpose of this guide is to empower you with the knowledge and skills needed to make changes to your website independently. By following the instructions and tips provided, you'll be able to keep your website up-to-date, engaging, and secure.

## Overview of the Website

Forestclimateleaders.org website is designed to be a dynamic and interactive platform that serves your specific needs. From showcasing your services to sharing valuable content, the website has been built with flexibility and functionality in mind. This guide will walk you through the main features and tools available, ensuring you can make the most out of your website.

Let's get started on this journey to mastering your forestclimateleaders.org website!

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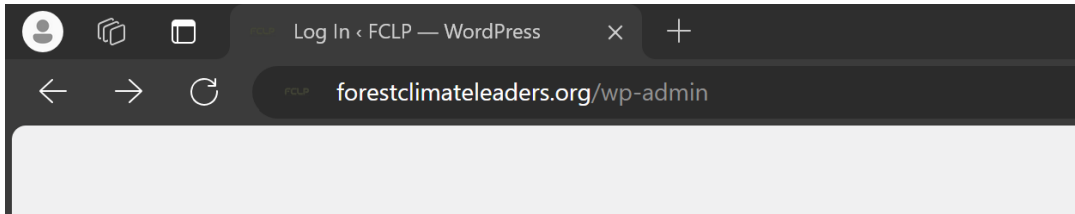
# LOGGING IN

**URL to Access the Admin Panel:** <https://forestclimateleaders.org/wp-admin>

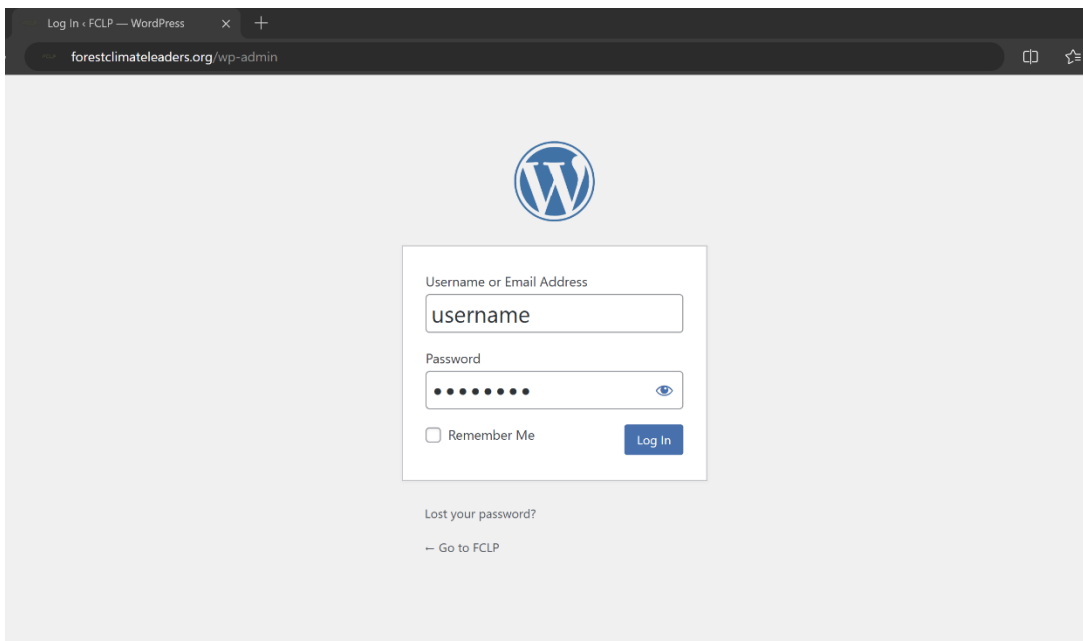
**Username and Password:** The credentials are shared in a separate email.

## Steps to Log In:

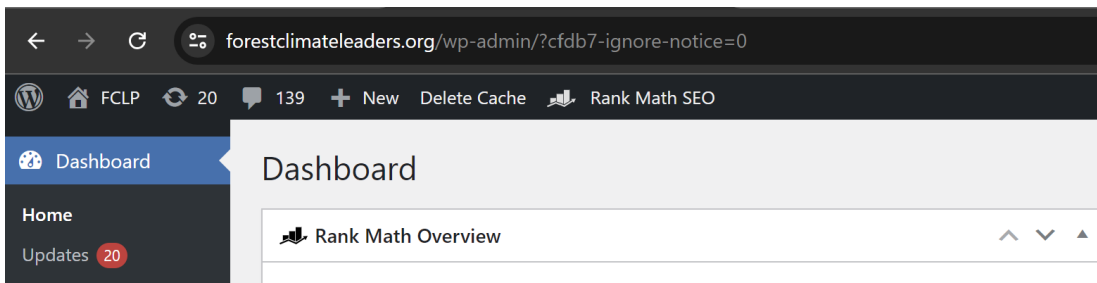
1. Open your browser, such as Chrome or Microsoft Edge, and navigate to the admin panel URL



2. Enter your username and password.



3. After logging in successfully, you will be directed to the dashboard.



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# UNDERSTANDING THE DASHBOARD

The WordPress Dashboard is your command center for managing your website. Upon logging in, you'll be greeted with a range of tools and options designed to help you control every aspect of your site. Let's break down the key components of the Dashboard and what they do.

## Overview of the Dashboard

- **The Menu (Left Sidebar):** The left sidebar is your main navigation area. It contains links to all the administrative functions and settings of your website. Here's a quick rundown of the main menu items:
  - **Dashboard:** The homepage of your admin area. It provides an at-a-glance overview of your site, including site health, activity, and quick links to important areas.
  - **Posts:** This is where you manage all your blog posts. You can create new posts, edit existing ones, and categorize them.
  - **Media:** The media library is where all your uploaded images, videos, and other media files are stored. You can add new files and manage existing ones.
  - **Pages:** Similar to posts, but for static content like your homepage, about page, and contact page. You can create, edit, and manage your site's pages here.
  - **Comments:** This section allows you to manage comments left by visitors on your posts. You can approve, reply, edit, or delete comments.
  - **Appearance:** Here, you can customize your site's appearance. This includes managing themes, customizing the theme, and managing widgets and menus.
  - **Plugins:** Manage all your plugins from this section. You can add new plugins, activate/deactivate them, and update or delete them.
  - **Users:** This section allows you to manage all users with access to your site. You can add new users, edit user profiles, and assign roles.
  - **Tools:** Various tools for managing and maintaining your site, including import/export options.
  - **Settings:** This section allows you to configure the basic settings of your site, such as site title, email address, time zone, and more.

## Common Dashboard Features

- **Toolbar (Top Bar):** The toolbar at the top of the screen provides quick access to some of the most commonly used functions. Here, you can find shortcuts to view your site, add new posts/pages, and access your profile settings.
- **Welcome Widget:** This is a quick start guide to help you with the most basic tasks, like creating a page or setting up your homepage. You can dismiss this widget once you're comfortable with the basics.
- **At a Glance:** This section provides a quick overview of the number of posts, pages, comments, and the currently active theme.
- **Activity:** This widget shows your recent site activity, including recent posts and comments.

- **Quick Draft:** Allows you to quickly write a draft post. It's a good place to jot down ideas for future content.
- **Site Health:** This tool helps you monitor your site's performance and security, offering suggestions for improvements.

## Exploring Further

Feel free to explore the Dashboard to familiarize yourself with the various options and settings. Each menu item often has submenus that offer more specific controls and settings. Don't worry about making mistakes – you can always revert changes or seek help if needed.

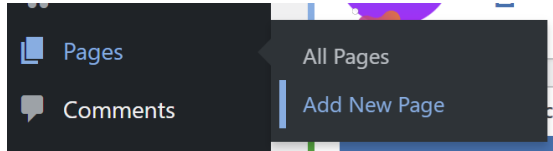
The WordPress Dashboard is designed to be intuitive and user-friendly. With a bit of practice, you'll be navigating it like a pro in no time!

**Before editing the live website, it is highly recommended to take a full backup of the website (as explained in the backup section). This ensures that you can quickly and easily recover any lost data or pages.**

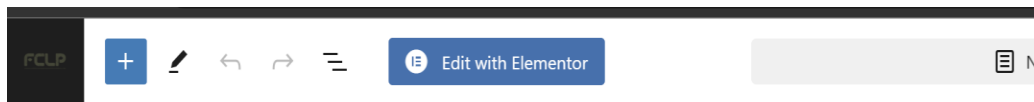
# MANAGING PAGES

- **Creating a New Page:**

- Navigate to Pages > Add New.

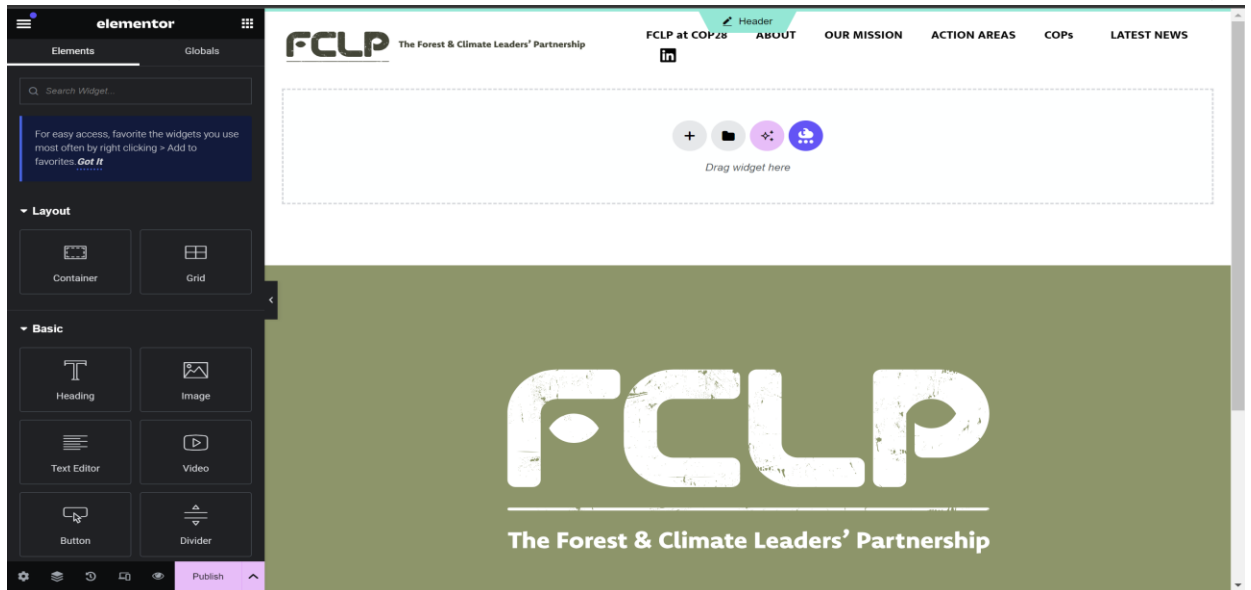


- Click on “Edit with Elementor”.



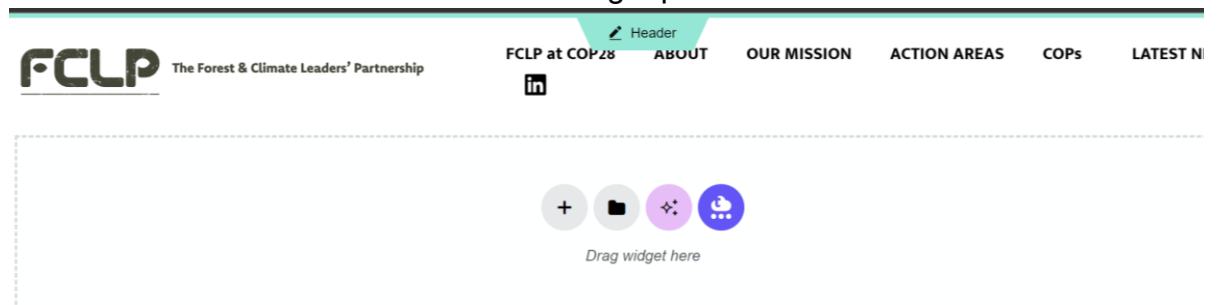
To make this website easy to edit, I used Elementor. It is very user-friendly and offers various elements like text editors, buttons, and tables, which you can easily drag and drop as needed.

After clicking on the Edit with Elementor button you will be redirected to the below page.



- How to add and format layout, text, images, and other media.

- Click on the “+” button located on the right panel.





- After clicking, you will be prompted to choose a layout. I suggest selecting the Flexbox option.

Which layout would you like to use?

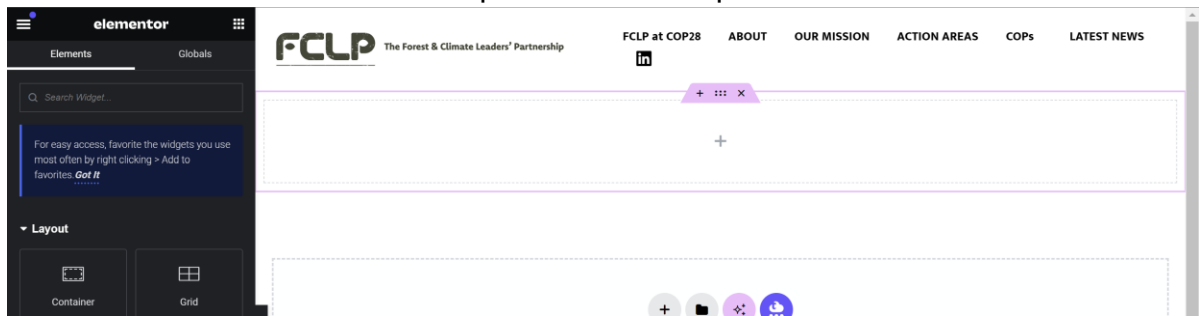


- Then, you can choose your desired layout structure.

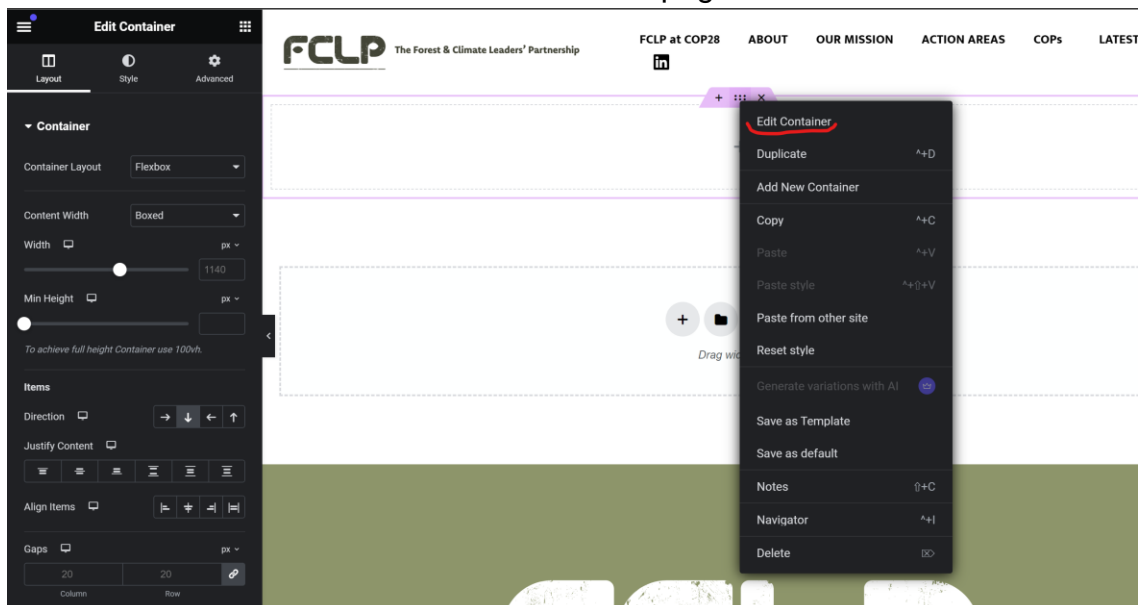
Select your structure



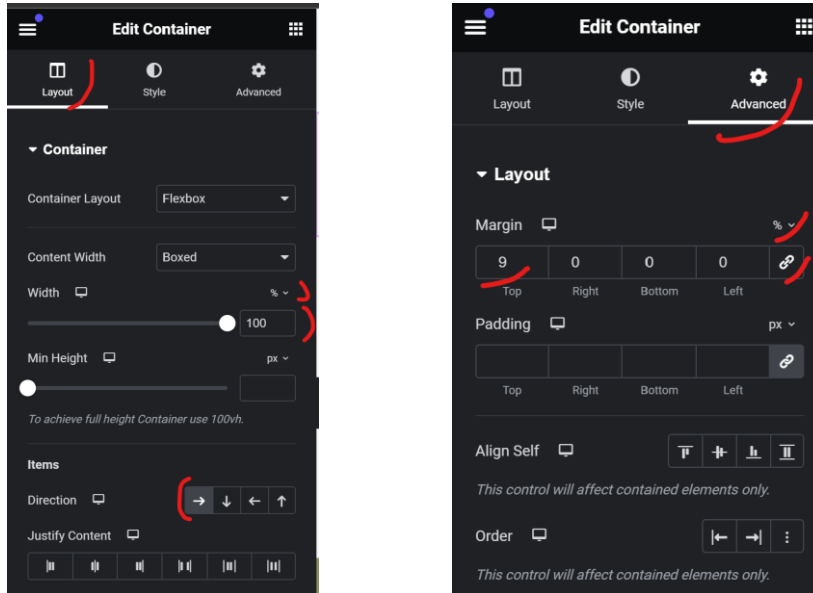
- Now, you will have the layout ready for editing. You can add text, images, media, and more from the Elementor panel on the left pane.




- Click on the "+" button located inside the newly added layout and choose from the elements list on the left panel to make the desired changes to the page.
- For this example, we will change the layout width and margins, add text and an image, then edit them by changing the size, background, font, and color. The steps to follow are shown in the images below (Highlighted in red are the attributes that have been changed). From the Elementor panel, you can search or scroll to find the desired element for the page.



As shown above, we right-clicked on the layout controls to open the menu and selected "Edit Container."

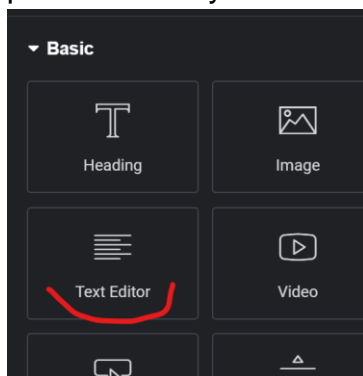


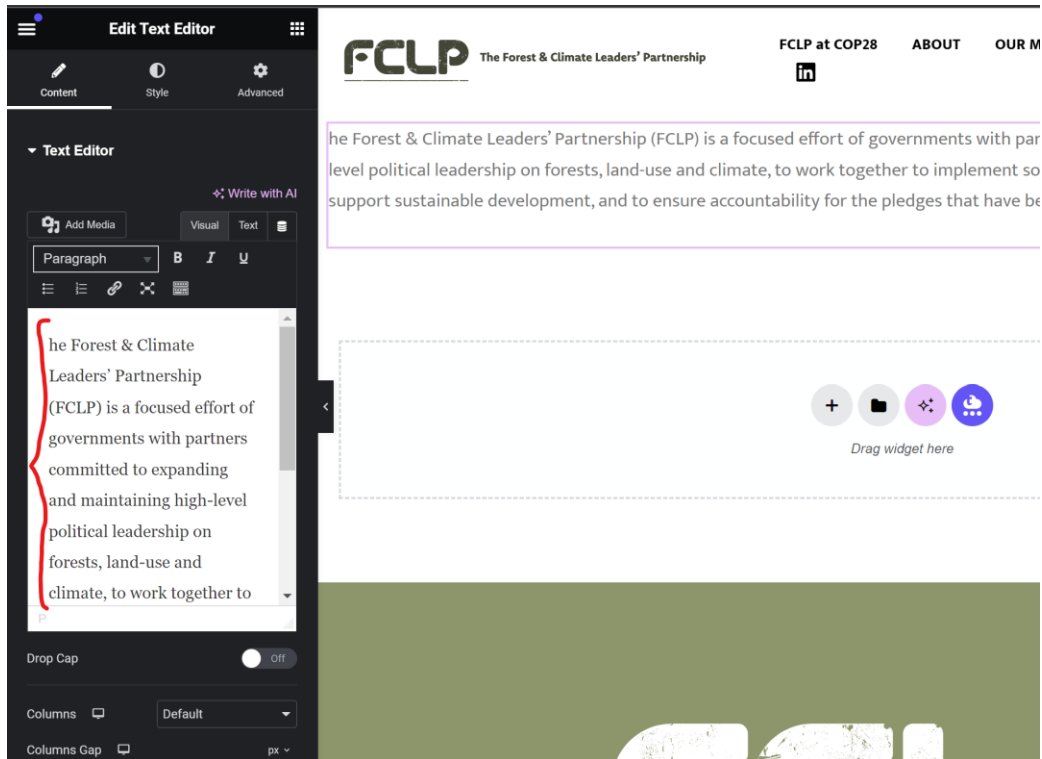
In the Layout tab, change the width unit to "%" and set the value to 100. This will make the layout cover 100% of the page width. You can adjust the height in a similar manner, choosing from units like pixels, centimeters, inches, and more. and change the direction to left to right.

In the Advanced tab, uncheck the "Link Values Together"  option and set the top margin to 9%.

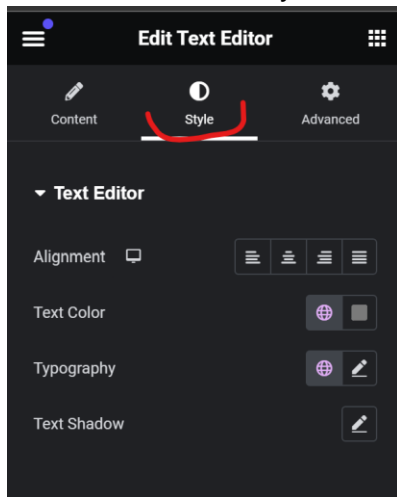


Click on the "+" button and drag and drop the text editor element from the Elementor panel to the layout.



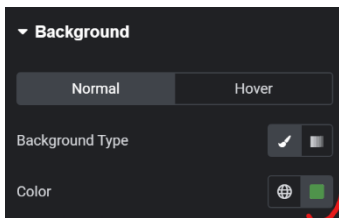
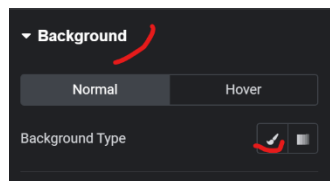
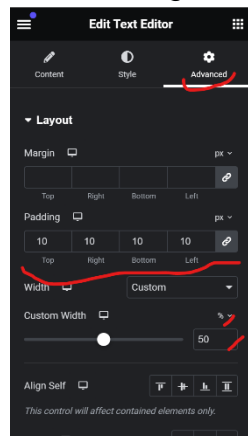


In the Content tab, you can add and format the text.

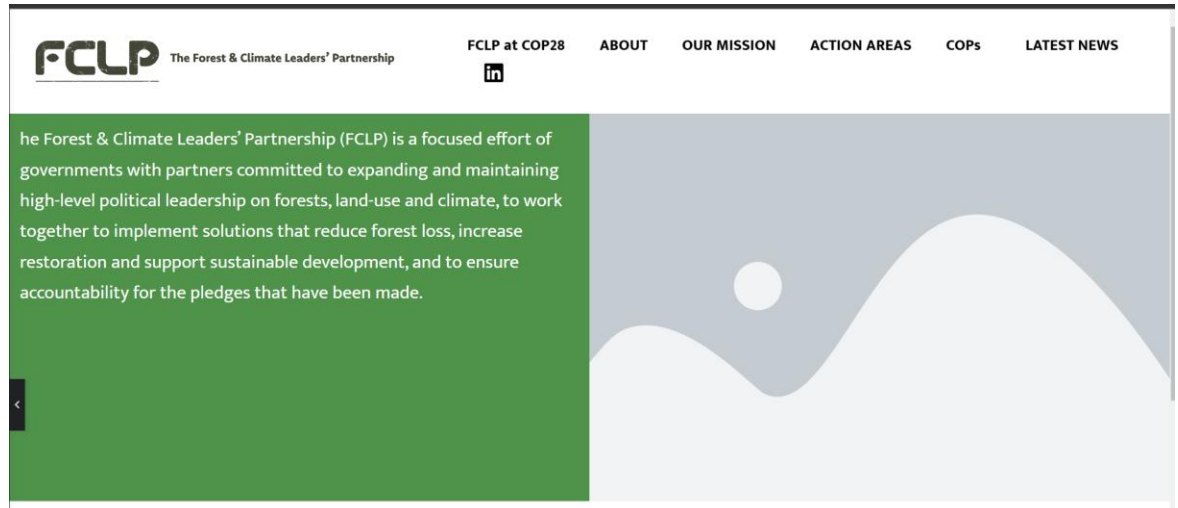


In the Style tab, you can change the text color, Typography (fonts, size), text shadow and the alignment. Change the text to white.

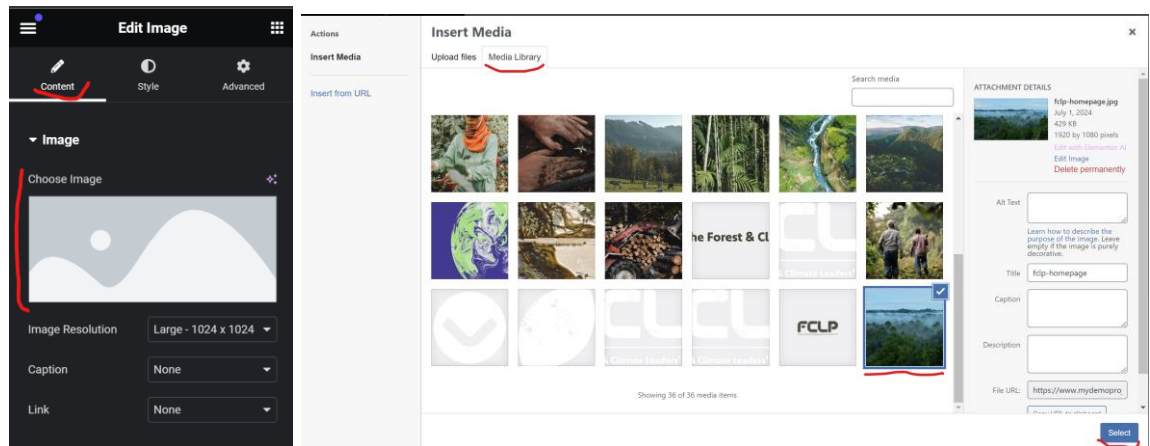
In the Advance tab, you can change the margin, padding, text editor width and more. change the width to 50% and scroll down and change background color.



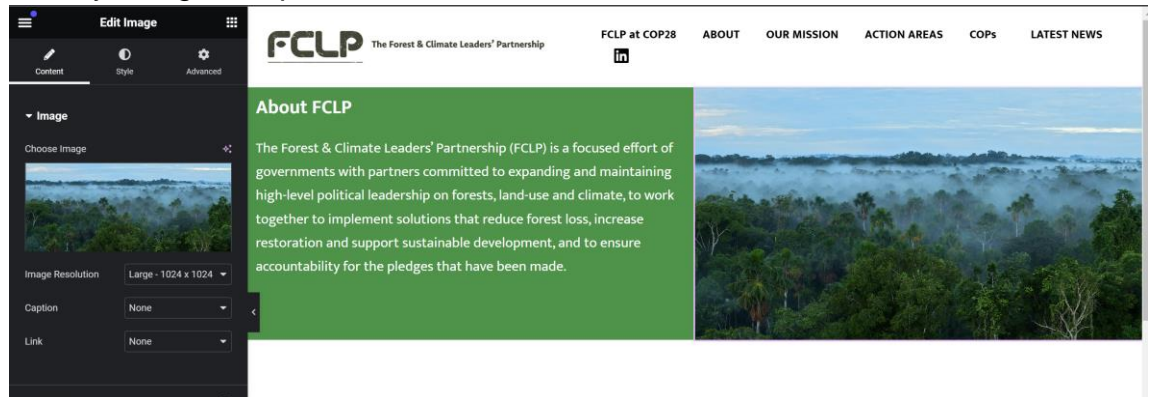
Right-click on the layout, and you'll see options on the left to choose an element from the list. Drag and drop the image element to the right of the text editor. As you move the image, you'll notice a pink-colored area indicating where it will be placed. Release the image in that area.



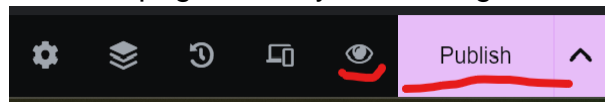
Click on the image element, and you'll see options on the left side where you can modify the image and adjust other properties, similar to the text editor described earlier.



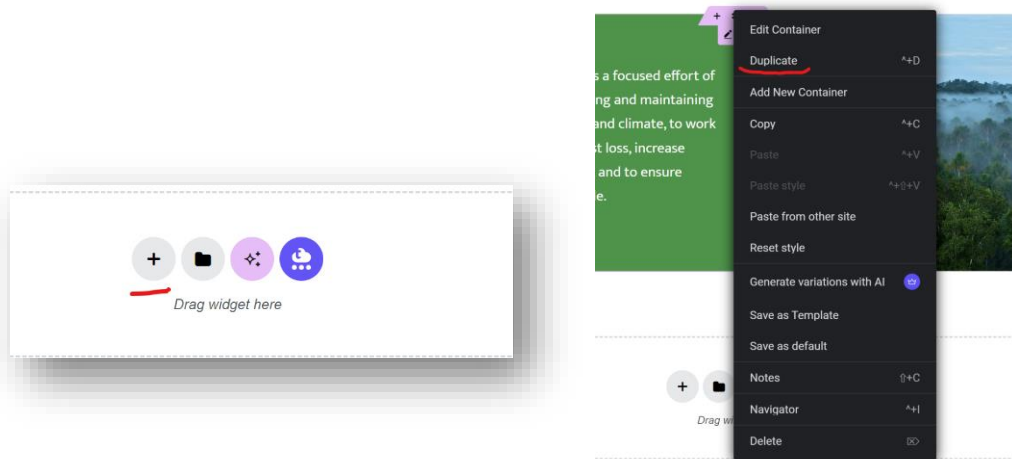
In the Media Library, you can either select from pre-uploaded media or upload new files by using the Upload Files tab.



Our new page is ready. You can go ahead and publish it, then view the results.



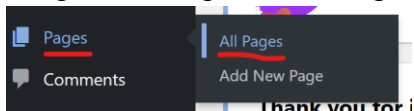
- To add a new layout, click the “+” button below the current layout. Alternatively, you can duplicate the existing layout by right-clicking on the top of the layout, selecting "Duplicate," and then adjusting the content as needed.



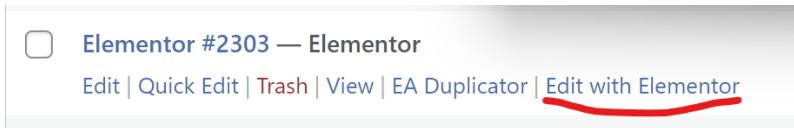
or

- **Editing an Existing Page:**

- Navigate to Pages > All Pages.



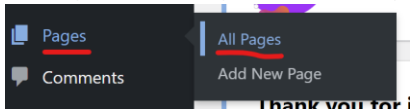
- Select the page to edit.



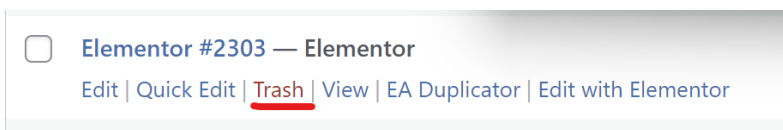
- Make the necessary changes as outlined in the "Adding New Page and Updating Content" sections.
- Save and update/publish the changes.

- **Deleting a Page:**

- Navigate to Pages > All Pages.



- Select the page to delete or click on the “Trash” link.
- Move to Trash and confirm deletion.



# UPDATING CONTENT

Keeping your website content fresh and up-to-date is crucial for engaging your audience and maintaining the relevance of your site. In this section, we'll cover how to update text, images, and other media on forestclimateleaders.org website.

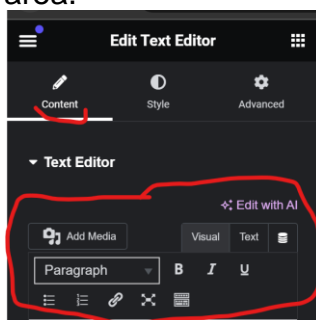
## • Updating Text Content


### 1. Editing Existing Text:

- **Navigate to the Page:** Go to the left sidebar and select **Pages**, depending on where you want to make changes.
- **Select the Item to Edit:** Click on the Edit with Elementor link under the page you wish to update. This will open the editor interface.
- **Make Your Changes:** You can now edit the text directly in the editor. You'll see different blocks for each section of content.
- **Save or Update:** Once you've made your changes, click the **Update** button on the bottom-left side of the screen to save your changes.

### 2. Formatting Text:

- **Text editor:** You can format your text as needed using the Content tab and the text area.



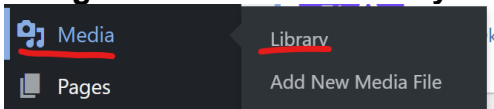
- **Preview Changes:** Before saving, use the  button to see how your changes will look on the live site.



## • Updating Images and Media

### • Replacing Existing Images:

- **Navigate to the Media Library:** Go to **Media > Library** in the left sidebar.



- **Select the Image:** Click on the image you want to replace. You'll see an option to **Replace Media** (this option might require a plugin if not available by default).
- **Upload New Image:** Follow the prompts to upload a new image file to replace the existing one.

### • Adding New Media:

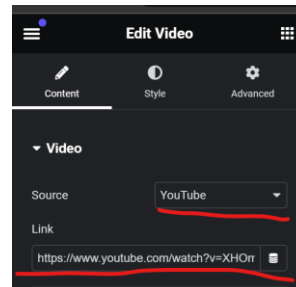
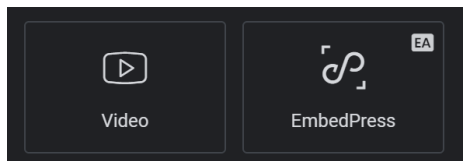
- **Add New Files:** Go to **Media > Add New**. You can drag and drop files or click the **Select Files** button to upload new images, videos, or documents.

- **Insert Media into Pages/Posts:** While editing a page or post, click the **Add Media** button above the editor. Select the media file from your library or upload a new one. You can then adjust its alignment and size before inserting it into your content.
- **Managing Media Files:**
  - **Edit Media:** Click on any media file in the library to access its details. You can edit the file's title, caption, alt text, and description.
  - **Delete Media:** To delete an item, select it in the media library and click **Delete Permanently**. Be cautious, as this will remove the file from the site entirely.

## ● Embedding Media

### 1. Videos and Audio:

- **Embed Directly:** To embed videos or audio files from platforms like YouTube or Vimeo, simply paste the URL directly into the editor. WordPress will automatically convert it into an embedded player.
- **Use the Embed Block:** In the Elementor editor, you can use video element to embed your videos.



### 2. Other Media Types:

- **Embed Documents:** For PDFs and other documents, you may need a plugin to provide an embed option or simply link to the file.

## Final Steps

- **Review Your Changes:** After updating text or media, always preview your changes to ensure everything looks as expected.
- **Save and Publish:** Once you're satisfied with the updates, click **Publish** to make your changes live.

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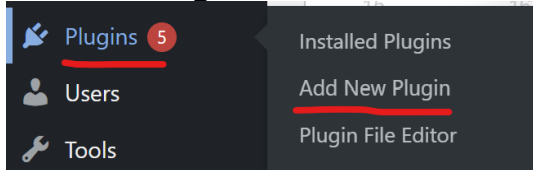
# MANAGING PLUGINS

Plugins are powerful tools that extend the functionality of your WordPress site, allowing you to add features, enhance performance, and improve security. This section will guide you through managing your plugins, including installing, updating, and configuring them.

## Installing Plugins

### 1. Navigate to the Plugins Page:

- Go to **Plugins > Add New** in the left sidebar of the WordPress admin panel.



### 2. Search for a Plugin:

- Use the search bar to find the plugin you need. You can search by plugin name or keywords related to the functionality you're looking for.

### 3. Install the Plugin:

- Once you find the desired plugin, click the **Install Now** button next to it. The installation process will begin.

### 4. Activate the Plugin:

- After installation, the button will change to **Activate**. Click it to enable the plugin on your site.

## Updating Plugins

### 1. Check for Updates:

- Go to **Plugins > Installed Plugins**. If updates are available, you will see a notification above the list of plugins.

### 2. Update Plugins:

- Click the **Update Now** link under the plugin that needs updating. WordPress will handle the update process automatically.

### 3. Bulk Updates:

- If multiple plugins need updating, you can select them by checking the boxes next to their names, then use the **Bulk Actions** dropdown menu to choose **Update** and click **Apply**.

## Deactivating and Deleting Plugins

### 1. Deactivate a Plugin:

- Go to **Plugins > Installed Plugins**. Find the plugin you wish to deactivate and click the **Deactivate** link beneath it. This will disable the plugin but keep it installed.

### 2. Delete a Plugin:

- After deactivating a plugin, the **Delete** link will appear. Click **Delete** to remove the plugin from your site entirely. Confirm the deletion when prompted.

## Configuring Plugins

### 1. Access Plugin Settings:

- Some plugins have their own settings pages. To access these, go to **Settings** in the left sidebar or find a menu item specific to the plugin you installed.

### 2. Configure Plugin Options:



- Follow the plugin's documentation or on-screen instructions to adjust settings according to your needs. Each plugin will have its own configuration options, so refer to the plugin's support resources for detailed guidance.

### Plugin Best Practices

- **Regular Updates:** Keep your plugins up-to-date to ensure compatibility with the latest WordPress version and to benefit from security and performance improvements.
- **Review and Test:** Before installing a new plugin, review its ratings, reviews, and compatibility with your WordPress version. Test new plugins on a staging site, if possible, to avoid potential conflicts.
- **Manage Plugin Conflicts:** Occasionally, plugins may conflict with each other or with your theme. If you experience issues, deactivate all plugins and reactivate them one by one to identify the problem.

### Troubleshooting

- **Plugin Issues:** If you encounter issues after installing or updating a plugin, try deactivating it to see if the problem resolves. Consult the plugin's support forum or documentation for additional help.

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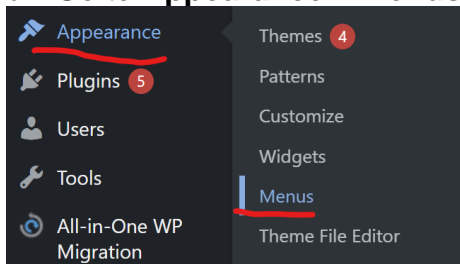
# CREATING AND MANAGING MENUS

Menus are essential for organizing and displaying your website's navigation links, helping users find important pages and sections quickly. In this section, we'll walk you through the process of creating, managing, and customizing menus in WordPress.

## Creating a New Menu

### 1. Navigate to Menus:

- Go to **Appearance > Menus** in the left sidebar of the WordPress admin panel.

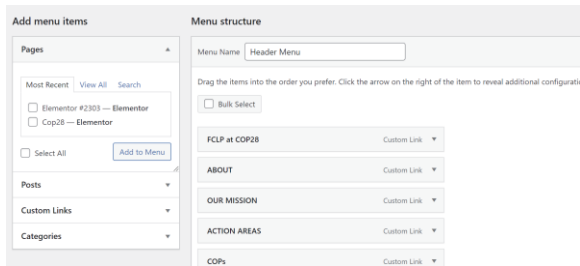


### 2. Create a New Menu:

- Click the **Create a New Menu** link at the top of the page.
- Enter a name for your menu in the **Menu Name** field (e.g., "Main Menu").
- Click **Create Menu** to add the new menu to your site.

### 3. Add Items to Your Menu:

- On the left side, you'll see several boxes, including **Pages**, **Custom Links**, and **Categories**.
- Check the boxes next to the items you want to add and click **Add to Menu**. You can add pages, posts, categories, and custom links to your menu.



- Arrange the menu items by dragging and dropping them into place. You can create sub-menus by dragging items slightly to the right under other items.

#### 4. **Save Your Menu:**

- Click the **Save Menu** button to store your changes.

## Assigning Menus to Locations

### 1. **Select Menu Locations:**

- In the **Menu Settings** section, you'll see **Display location** options. These locations correspond to different areas of your site where the menu can appear (e.g., Primary Menu, Footer Menu).
- Check the box for the location where you want the menu to be displayed.

### 2. **Save Changes:**

- Click the **Save Menu** button again to apply your menu to the selected locations.

## Editing an Existing Menu

### 1. **Access Menu Settings:**

- Go to **Appearance > Menus** and select the menu you want to edit from the dropdown list.

### 2. **Modify Menu Items:**

- To change the name or URL of an existing menu item, click the down arrow next to the item to expand its settings. Make your changes and click **Save Menu**.

### 3. **Rearrange Menu Items:**

- Drag and drop menu items to reorder them. You can also create nested sub-menus by positioning items under other items.

### 4. **Remove Menu Items:**

- Click the down arrow next to the menu item you want to remove, then click **Remove**. Click **Save Menu** to apply the changes.

## Customizing Menus

### 1. **Add Custom Links:**

- In the **Custom Links** box on the left, enter the URL and link text for custom links. Click **Add to Menu** to include them in your menu.

### 2. **Create Drop-Down Menus:**

- To create a drop-down menu, simply drag menu items slightly to the right under a parent item. This will create a hierarchical structure with sub-menus.

### 3. **Edit Menu Labels and Titles:**

- Click the down arrow next to any menu item to change its label (what users see) or its title attribute (additional information shown on hover).

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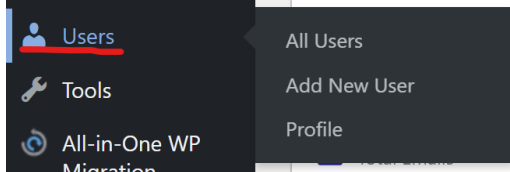
# USER MANAGEMENT

Managing users effectively is crucial for maintaining the security and organization of your WordPress site. Whether you're adding new users, updating user roles, or removing users, this section will guide you through the essential steps for user management.

## Adding New Users

### 1. Navigate to User Management:

- Go to **Users > Add New** in the left sidebar of the WordPress admin panel.



### 2. Enter User Information:

- **Username:** Choose a unique username for the new user.
- **Email:** Enter a valid email address. The user will receive a notification with login details.
- **First Name and Last Name:** Optional fields for user details.
- **Website:** Optional field to add the user's website URL.
- **Password:** Generate a strong password or create one manually. Users will be prompted to change their password upon first login if you use the "Send User Notification" option.
- **Role:** Select the user's role from the dropdown menu. The available roles are:
  - **Subscriber:** Can manage their own profile and read content.
  - **Contributor:** Can write and manage their own posts but cannot publish.
  - **Author:** Can publish and manage their own posts.
  - **Editor:** Can manage and publish posts of all users and manage comments.
  - **Administrator:** Has full access to all administrative features.

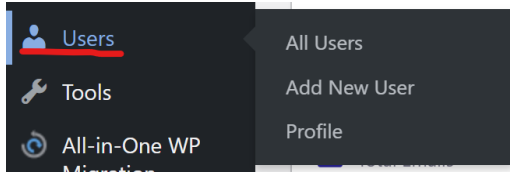
### 3. Add User:

- Click the **Add New User** button to create the new user account. They will receive an email with their login credentials if the notification option was selected.

## Editing User Profiles

### 1. Access User Profiles:

- Go to **Users > All Users** and click on the user's username you want to edit.



### 2. Update User Information:

- You can update the user's username, email, name, website, and role from the profile page.
- **Change Password:** To update the password, scroll to the **Account Management** section and enter a new password.

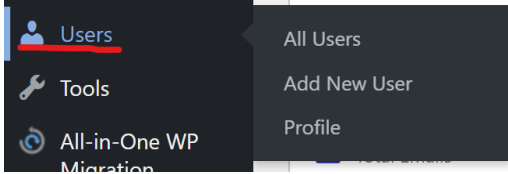
### 3. Save Changes:

- Click the **Update User** button to save any changes made to the user's profile.

## Managing User Roles

### 1. Edit User Roles:

- Go to **Users** > **All Users** and click **Edit** under the user's name.



- In the **Role** dropdown, select a new role for the user.

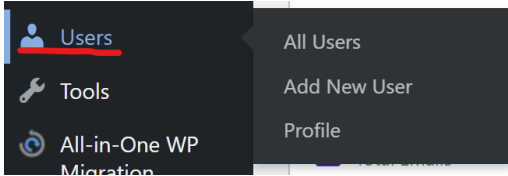
### 2. Save Changes:

- Click **Update User** to apply the new role and permissions.

## Removing Users

### 1. Delete a User:

- Go to **Users** > **All Users** and click **Delete** under the user's name.



- You'll be prompted to confirm the deletion. If the user has content, you can choose to attribute their posts to another user or delete them along with the user account.

### 2. Reassign Content (if applicable):

- If the user has posts or pages, you will be asked to reassign their content to another user before completing the deletion.

## User Management Best Practices

- **Role Assignment:** Assign roles based on the user's responsibilities. Avoid giving unnecessary permissions to limit security risks.
- **Regular Reviews:** Periodically review user accounts and roles to ensure that access levels are up-to-date and relevant.
- **Password Security:** Encourage users to use strong passwords and consider enabling two-factor authentication for added security.

## Troubleshooting

- **Access Issues:** If a user reports access issues, verify their role and permissions. Ensure they are using the correct username and password.
- **Content Reassignment:** If deleting a user with content, ensure that content is reassigned appropriately to avoid losing important data.

By effectively managing users and their roles, you can ensure forestclimateleaders.org site remains secure and well-organized, providing a smooth experience for both administrators and site visitors.

# BACKUP AND RESTORE

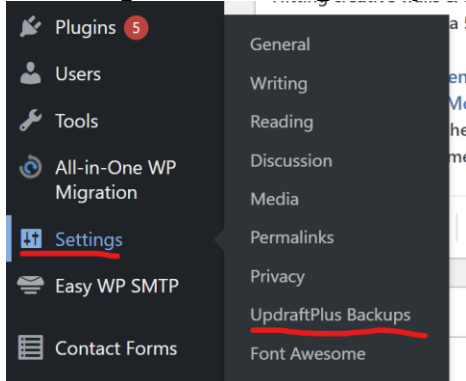
**UpdraftPlus** is a reliable WordPress plugin for backing up and restoring your website. I have installed it already, here's a brief guide on how to use it:

## 1. Install and Activate UpdraftPlus (if deleted accidentally):

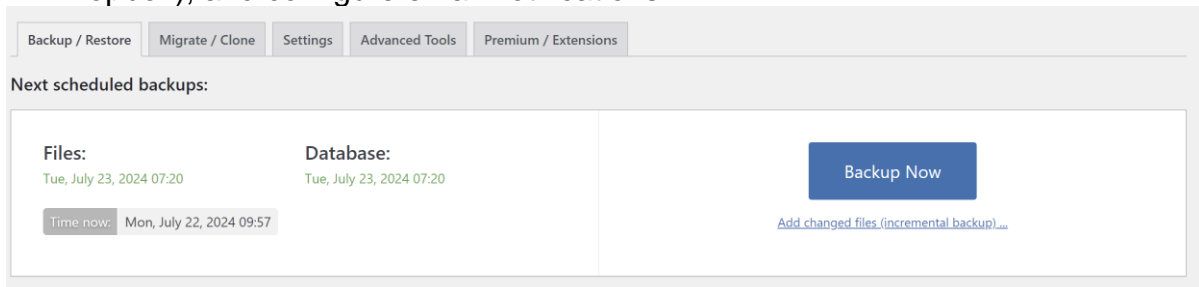
- Go to **Plugins > Add New**, search for **UpdraftPlus**, and click **Install Now**. Once installed, click **Activate**.

## 2. Configure Backup Settings:

- Navigate to **Settings > UpdraftPlus Backups**.

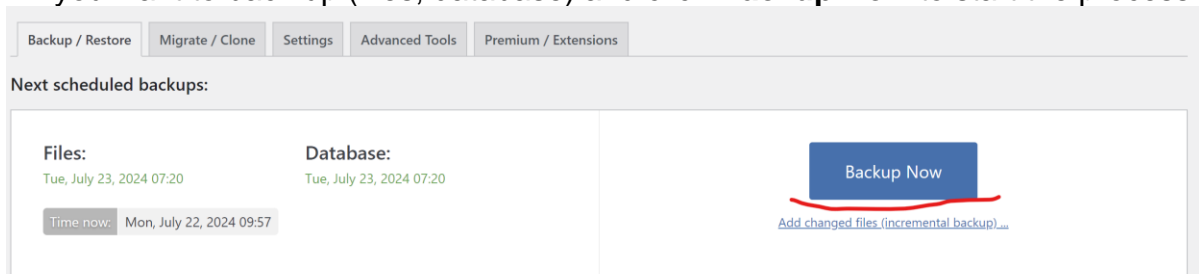


- Set your backup schedule, choose remote storage options (like Google Drive or Dropbox), and configure email notifications.

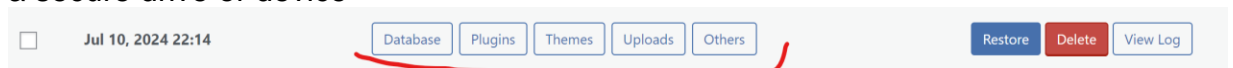


## 3. Perform a Backup:

- In the **UpdraftPlus Backups** settings page, click **Backup Now**. Select the components you want to back up (files, database) and click **Backup Now** to start the process.

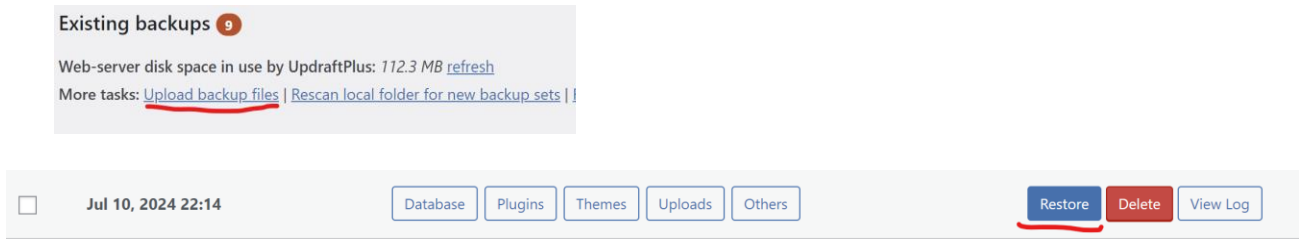


- Once the backup is complete, download all the backup components and store them on a secure drive or device



#### 4. Restore from a Backup:

- Go to **Settings > UpdraftPlus Backups** and select the **Existing Backups** tab or upload from your computer. Choose the backup you wish to restore, and click **Restore**. Follow the prompts to restore your files and database.



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## TROUBLESHOOTING

Occasionally, you might encounter issues with your WordPress website. Here are some common problems and their solutions:

### 1. Website is Down

- **Check Hosting Status:** Ensure that the issue isn't related to your hosting provider. Sometimes, server outages or maintenance can cause temporary downtime.
- **Contact DreamHost Support:** If your website is down and you suspect a hosting issue, contact DreamHost customer support. They can provide assistance and information on any ongoing server problems. You can reach DreamHost support by visiting their website.

### 2. Login Issues

- **Forgotten Password:** Use the "Lost your password?" link on the login page to reset your password via email.
- **Browser Cache:** Clear your browser cache and cookies, then try logging in again.
- **Plugin Conflict:** Disable all plugins via FTP or your hosting control panel to see if a plugin is causing the issue.

### 3. Content Not Updating

- **Clear Caches:** Clear your browser cache and any site caches if you're using a caching plugin.
- **Check for Plugin Conflicts:** Disable caching or other plugins to see if they're affecting content updates.